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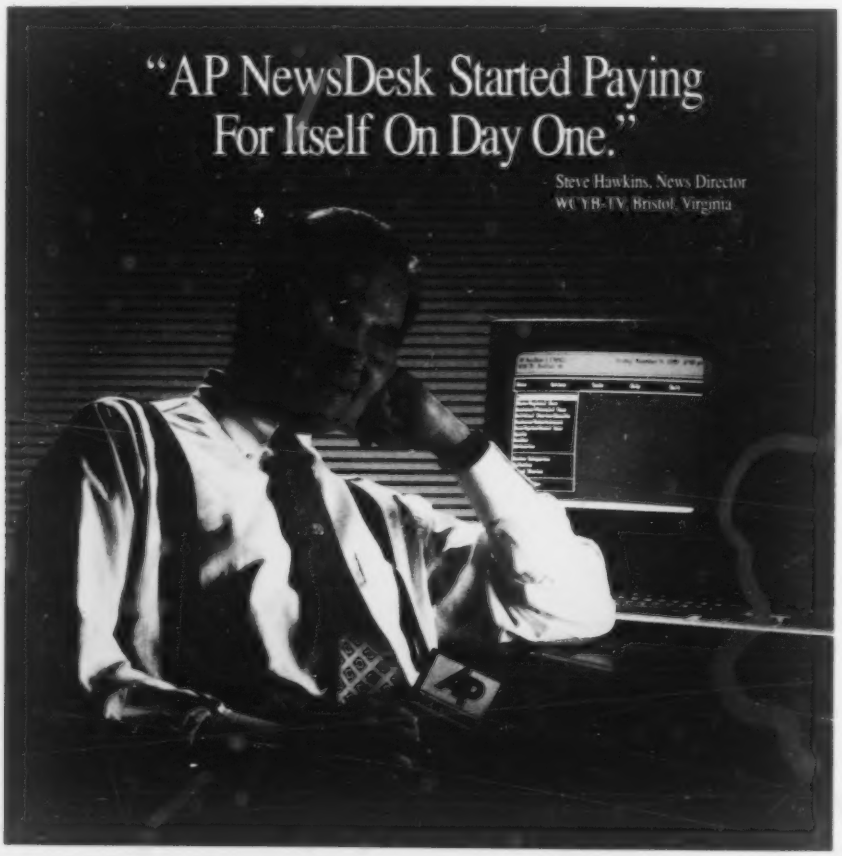

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THIS WEEK

6 / CBS TIGHTENS BUDGET

CBS executives met to discuss strategic changes in the company's operations and are expected to implement budget cutting and other changes, possibly as early as this week. One securities analyst estimated the likely reductions at between $60 million and $100 million, which could imply personnel reductions numbering in the hundreds.

27 / NCTA 1991

There is a growing sense of optimism in the cable industry as video compression nears reality. The upshot: cable systems could well be delivering hundreds of channels of programing by the late 1990's. Such a specter has created a host of technical, marketing and programing challenges. On the regulatory front, three FCC commissioners appear to be backing away from instituting any "good actor" test in the agency's effective competition rulemaking (page 29).

31 / REREGULATION FIGHT

In his opening speech, National Cable Television Association President James Mooney issued a "clarion call" to all cable operators to do everything they can to fight cable reregulation, urging them to visit their congressmen, "sit down with your local newspaper editor, talk to your customers."

News from NCTA: explosion in cable channel capacity (page 27)

31 / THE NEVER-ENDING SALE?

Another week in the ever-impending sale of FNN added some more knots to an already tangled situation. A group of 15 state attorneys general filed a petition asking the U.S. Bankruptcy Court to reject CNBC's bid to buy the network; another 15 state attorneys general filed a letter asking the court to approve the 20-day delay the FTC is seeking while it conducts its antitrust investigation into a sale to CNBC. Meanwhile, CNBC, which still has a definitive agreement with FNN, rejected some of FNN's affiliate contracts and FNN's employes succeeded in getting many of their severance demands met.

33 / BVT DEAL

Buena Vista Television has finalized a deal to sell a 50-title film package into broadcast syndication for more than $125 million. Television programers said the deal was a syndication first, because the stations buying the package agreed to do so even though less than half the films have been produced. The stations are banking on the ability of the Disney studios, including Disney, Touchstone and Hollywood Pictures, to continue producing the kinds of films that have made Disney the top revenue producer at the box office the past two years.

34 / AFFILIATE APPROVAL

Fox affiliates gave the network high marks following a series of seven regional meetings. Optimistic discussions on Fox's potential network status were among the topics covered, and clips of 1991-92 television pilots were screened. Station owners and general managers approved of much of the network's development slate, but expressed some concerns over the content of Fox programing.

35 / ALL THE RIGHT MOVES

The four executives responsible for setting the network television schedules—ABC's Ted Harbert, NBC's Lee Currlin, Fox's Sandy Grushow and CBS's Peter Tortorici—can be viewed as chess players in a game that determines when and where viewers see their favorite television shows. Their scheduling decisions can mean extended life or certain cancellation for a program, and set in motion a change of momentum for a network, as evidenced by CBS's surprising February sweeps win.

42 / 'MARRIED' INPUT

Columbia Pictures Television is developing a multi-million dollar co-op advertising plan for *Married...with Children*, which debuts in syndication next fall. As part of the campaign, CPT's marketing team will help stations

create sales presentations to maximize advertising revenue at the local level.

42 / SYNDICATED SWEEPS

For many syndicated shows, particularly access strips and late night product, viewing was down in the February 1991 sweeps. But for sitcoms, the big news was that *Golden Girls* surpassed *Cosby* as the top-rated off-network comedy.

45 / CABLE FINANCES

According to cable executives at the opening NCTA session, the current credit crunch is making it difficult for cable MSO's to expand their core businesses. But they must—and can—find ways to improve their existing ones.

48 / PAY PRESENTATION

According to marketing executives of major MSO's, the basics of salesmanship and good packaging are needed to galvanize the pay services. However, some pay programers in the audience did not agree. For one, nothing short of "a whole new approach" is required.

53 / POST WAR DROP

Viewer appetite for international news appears to have dropped quickly back down to pre-war levels. But suppliers of footage from abroad continue to make headway in the U.S., with CNN Newsource alone picking up an additional 25 affiliates during the Persian Gulf conflict.

54 / WAR CHEST

Ad dollars that all but dried up in January and February are beginning to return to radio. While monthly and quarterly figures won't be analyzed for a few weeks, industry executives are cautiously optimistic that advertisers who put their schedules on hold during the war are ready to invest in the medium. Local, spot and network radio are poised to rebound in the second quarter.

'Golden Girls' is top off-network comedy in syndication (page 42)

59 / COMMENTING ON FIN-SYN

Comments filed last week at the FCC on its financial interest-syndication proceeding demonstrated the distance that remains between the networks and Hollywood. The networks, unhappy with a "majority" proposal supported by three of the five FCC commissioners, used the comments as an opportunity to discuss a new fin-syn deal developed by the networks.

61 / HOLLYWOOD SHUFFLE

Movie studios that drove the three-network prime time upfront market last year may not be ready for an encore. An analysis of studio advertising spending habits shows that syndication and, to a lesser degree, cable budgets are increasing at a greater rate than network budgets. While network and local/retail still command the most attention from studio marketing planners, syndication and cable are making their presence known.

66 / DIGITAL VTR'S MULTIPLYING

The second generation of D-2 (composite digital) videotape recorders will be on display at the National Association of Broadcasters convention in Las Vegas, April 15-18. They offer expanded capabilities at lower costs. The NHK-developed half-inch composite digital format from Panasonic is stepping up to challenge D-2 in the marketplace.

69 / JUST SAY 'NO'

Too costly, too late and too little benefit—that's what satellite operators had to say about a proposal to place cable TV satellites three, rather than two, degrees apart in the sky. Their comments, filed at the FCC, asked that agency to resist petitions to change orbital assignment policy.

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RATINGS ROUNDUP

		7:00 PM	7:30 PM	8:00 PM	8:30 PM	9:00 PM	9:30 PM	10:00 PM	10:30 PM
MONDAY 3/18	ABC 12.3 / 20			MACGYVER (40) 11.8 / 18	12.8 / 19	AMER. FUNNIEST VIDEO SP. (33) 13.5 / 20	13.2 / 20	TUBE TEST (47) 11.6 / 19	11.0 / 20
	CBS 14.5 / 23			EVENING (27) SHADE 14.2 / 22	MAJOR (4) DAD 17.4 / 26	MURPHY (7) BRWN 17.2 / 26	DESIGN (13) WOMN 16.5 / 25	GOOD (45) SPRTS 11.5 / 19	MURPHY (53) SP 10.4 / 19
	NBC 12.4 / 20			FRESH (35) PRINCE 13.1 / 21	NBC MONDAY NIGHT MOVIE—RETURN OF THE JEDI (40) 10.8 / 16	12.1 / 18	12.4 / 19	13.7 / 23	12.5 / 23
	FOX 5.2 / 8			FOX NIGHT AT THE MOVIES—PRINCESS BRIDE (79) 4.9 / 8	5.4 / 8	5.3 / 8	5.3 / 8		
TUESDAY 3/19	ABC 11.3 / 18			WHO'S THE (33) BOSS 13.4 / 21	DAVIS (37) RULES 12.7 / 20	ROSEANNE (24) 14.6 / 22	COACH (36) 12.8 / 20	EDDIE DODD (72) 7.4 / 13	6.6 / 13
	CBS 14.4 / 24			CBS TUESDAY NIGHT MOVIE—THE WIZARD OF OZ (23) 13.9 / 22	15.1 / 23	14.7 / 22	14.9 / 23	RESCUE 911 (31) 13.5 / 24	13.5 / 26
	NBC 15.9 / 26			MATLOCK (15) 15.9 / 25	16.9 / 26	IN THE HEAT OF THE NIGHT (7) 16.8 / 26	17.6 / 27	LAW AND ORDER (28) 14.4 / 25	13.8 / 26
WEDNESDAY 3/20	ABC 12.5 / 21			WONDER (21) YEARS 15.0 / 25	GROWING (24) PAINS 14.6 / 24	DOOGIE (21) M.D. 15.0 / 24	ANYTHING (43) LOVE 12.1 / 20	EQUAL JUSTICE (58) 9.1 / 16	9.1 / 18
	CBS 10.1 / 17			48 HOURS (60) 8.6 / 15	8.5 / 14	JAKE AND THE FAT MAN (30) 13.5 / 22	14.4 / 24	WIOU (68) 8.1 / 14	7.4 / 14
	NBC 14.2 / 24			UNSOLVED MYSTERIES (13) 15.6 / 26	17.3 / 28	NIGHT (38) COURT 12.6 / 20	DEAR (47) JOHN 11.3 / 19	QUANTUM LEAP (28) 13.9 / 25	14.2 / 27
THURSDAY 3/21	ABC 11.4 / 19			ABC THURSDAY SPECIAL MOVIE (46) 10.0 / 16	11.4 / 18	11.9 / 19	12.4 / 20	PRIMETIME LIVE (47) 11.7 / 20	10.9 / 20
	CBS 9.1 / 15			CBS NCAA BASKETBALL CHAMPIONSHIP (59) 7.4 / 13	8.8 / 15	9.0 / 15	9.9 / 16	(65) 10.6 / 17	9.0 / 16
	NBC 17.8 / 29			COSBY (10) 16.9 / 28	DIFFERENT (7) WORLD 17.2 / 28	CHEERS (2) 19.1 / 30	WINGS (17) 16.1 / 26	L.A. LAW (3) 18.5 / 31	18.7 / 34
	FOX 8.4 / 14			SIMPSONS (40) 12.3 / 20	BABES (71) 7.5 / 12	BEVERLY HILLS, 90210 (73) 6.9 / 11	6.9 / 11		
FRIDAY 3/22	ABC 16.5 / 29			FULL (16) HOUSE 16.3 / 29	FAMILY (4) MAT. 17.4 / 30	PERFECT (20) STRAN. 15.2/ 26	BABY (19) TALK 15.3 / 27	20/20 (6) 17.4 / 31	17.3 / 33
	CBS 7.8 / 14			CBS NCAA BASKETBALL CHAMPIONSHIP (68) 6.9 / 13	7.4 / 13	8.2 / 15	8.3 / 15	(68) 8.3 / 15	7.7 / 14
	NBC 9.1 / 16			HUNTER (57) 8.6 / 15	8.8 / 15	10.2 / 18	10.5 / 18	DARK SHADOWS (63) 8.4 / 15	8.4 / 16
	FOX 5.0 / 8			AMERICA'S MOST WANTED (74) 6.7 / 12	6.9 / 12	AGAINST THE LAW (84) 3.3 / 6	2.9 / 5		
SATURDAY 3/23	ABC 8.5 / 16			YOUNG (65) RIDERS 7.8 / 14	8.6 / 16	ABC SATURDAY NIGHT MOVIE—LADY MOBSTER (69) 7.6 / 13	8.0 / 14	9.1 / 17	9.5 / 19
	CBS 8.4 / 15			CBS NCAA BSKTBALL CHMP. (58) 10.1 / 19	8.8 / 16	CBS SATURDAY MOVIE—WHERE THE HELL'S THAT GOLD (67) 7.2 / 13	7.4 / 13	8.2 / 15	8.2 / 16
	NBC 12.5 / 23			AMEN (50) 10.5 / 19	DOWN (50) HOME 10.5 / 19	GOLDEN (11) GIRLS 16.8 / 30	EMPTY (12) NEST 16.6 / 29	SHANNON'S DEAL (55) 10.6 / 20	9.9 / 20
	FOX 4.8 / 9			T. HIDDEN (82) VIDEO 4.9 / 9	YEAR- (83) BOOK 3.6 / 7	COPS (81) 5.0 / 9	COPS 2 (76) 5.7 / 10		
SUNDAY 3/24	ABC 14.1 / 23	ABC SUNDAY NIGHT MOVIE—THE TEN COMMANDMENTS (26) 9.1 / 16	11.3 / 19	13.8 / 22	15.1 / 23	15.7 / 24	15.6 / 24	16.4 / 27	16.8 / 28
	CBS 15.3 / 25	60 MINUTES (1) 18.8 / 34	20.6 / 34	EVENING (18) SHADE 15.4 / 24	CBS SUNDAY MOVIE—THE UNTOUCHABLES (31) 13.3 / 21	13.7/ 21	14.1 / 22	13.5 / 22	13.0 / 23
	NBC 10.3 / 16	SUPER BLOOP & JOKES (75) 6.1 / 16	6.8 / 11	EXPOSE (63) 8.4 / 13	REAL LIFE (50) JANE P. 10.5 / 16	NBC SUNDAY NIGHT MOVIE—SHOOT FIRST (38) 11.8 / 18	12.4 / 19	13.3 / 22	12.8 / 23
	FOX 7.8 / 13	TRUE CLR (80) 5.1 / 9	P. LEWIS (76) 5.7 / 10	LIVING (55) COLOR 10.1 / 16	GET A LIFE (62) 8.5 / 13	MRD. WITH (44) CHILD. 11.9 / 18	MRD. W. SP (53) CHILD. 10.4 / 16	COMIC STRIP LIVE (78) 5.9 / 10	4.7 / 8

WEEKLY PRIME TIME AVERAGE	ABC 12.4 / 21	CBS 11.6 / 19	NBC 13.0 / 22	FOX 6.5 / 11
SEASON PRIME TIME AVERAGE	ABC 12.5 / 21	CBS 12.4 / 20	NBC 12.8 / 21	FOX 6.4 / 10

YELLOW = 1/2 HR WINNER

NIGHTLY RATING / SHARE (##)—RANKING HALF-HOUR RATING / SHARE *—PREMIERE SOURCE: A.C. NIELSEN

curred that network business is beginning to rebound. "The marketplace took a breath when the war ended, and then people sat down and said: 'Let's get serious about this,' " he said. "A lot of people have been coming back into the marketplace, and pretty aggressively. On a pure volume or pressure-against-inventory basis, network radio is probably a lot stronger than television."

Battison said demand for the second and third quarters is particularly strong because of the return of corporate advertisers who drew back during the war. "The IBM's and Xerox's and GM's are all coming back big time. So is retail, which took a tumble last year because of all the problems that are indigenous to that segment of the economy." He said that aggressive advertisers understand that in a recession advertisers are looking for efficiency, going for effectiveness, which means that "network radio gets a longer look and a better piece of the pie."

Now that the war is over, the national economy is fighting its way out of the recession, Battison said. "The recession is both a state of mind and a self-fulfilling prophecy, and people are realizing that the only way to get out of a recession is to work out of it." Rather than cutting back during a recession, advertisers need to keep pushing and selling and changing the perception. "Change won't be immediate, but we see strong signs," he concluded. "The dollars haven't all shown up, but the conversations and negotiations are under way—and that's a good sign." –RR

POWER RATIO TRENDS BY RADIO FORMAT: OLDIES, AC, AOR, CR POST GAINS

Format	*% of 1990 stations*	*1990 ratio*	*1989*	*1988*	*1987*	*1986*
Adult contemporary	92%	1.46	1.31	1.41	1.34	1.38
Album oriented rock	72%	1.23	1.07	1.13	1.14	1.04
Classic rock	76%	1.25	1.04	1.13	1.12	1.06
Classical	56%	1.04	1.28	1.26	1.30	1.35
CHR	47%	1.03	1.0	1.07	1.08	1.07
Country	80%	1.39	1.34	1.49	1.38	1.42
Easy listening	5%	.69	.60	.85	.82	.83
Full service AM	86%	1.33	1.38	1.40	1.28	1.16
News/talk	77%	1.44	1.42	1.43	1.44	1.47
Nostalgia/big band	28%	.75	.71	.83	.75	.71
Oldies	87%	1.39	1.28	1.12	.93	.83
Soft lite-A/C	54%	1.22	1.36	1.24	1.18	1.26
Spanish	80%	1.21	1.26	1.27	1.32	1.24
Urban contemporary	11%	.76	.72	.75	.76	.83

Source: Miller, Kaplan, Arase & Co.

Newly released "National Composite Radio Revenue Report," which includes a "power ratio" study, shows that older-skewing formats continue to improve their profitability. The "power ratio" study measures the sales strength of individual formats. Oldies, adult contemporary, AOR and classic rock posted the strongest gains, while classical, soft adult contemporary and Spanish were down.

To understand the power ratio, using the example of the oldies format (1990 power ratio of 1.39), in a market where each share point is worth $1 million in revenue, the station can expect to bill $1.39 million.

The methodology used: the revenue share/audience share ratios for about 700 stations included in the report represent the 1990 revenue share per the National Composite Radio Revenue Report prepared for the station's specific market by Miller, Kaplan, Arase & Co., divided by the mean 12-plus average quarter hour audience share for summer 1989 through spring 1990, per Arbitron divided by 1.1 since an average of 90% of a given market's total revenue is reported to Miller, Kaplan, Arase & Co., by those stations collectively comprising the market revenue reporting cooperative. To minimize distortion, the three highest and three lowest ratios within a given format are not included in the power ratio computation. The same methodology applies to prior year figures.

KATZ, INTEREP STUDY ARBITRON

The sample size in radio ratings is an issue that has been in the forefront of industry debate for the last few years. In 1988 the Arbitron Radio Advisory Council began a study of raw in-tab sample sizes and their relationship to audience estimates. As a result of its findings, the council made a recommendation to Arbitron that it raise the sample size by 33% as a way to increase the reliability of its quarterly reports. At the time, Arbitron promised to increase the sample size by 5% for fall 1990, and an additional 5% in fall 1991, at no additional cost to subscribers (BROADCASTING, March 25).

Studies by the research divisions of both the Interep Radio Store and the Katz Radio Group reveal that although the average market received an increase in sample target as promised, the actual in-tab sample increase for the average market was 1.6%.

In a preliminary analysis of fall 1990 numbers for 20 markets, the Interep study found that three markets posted increases of in-tab of more than 5%, 10 other markets showed increases of less than 5%, and seven markets had lower in-tab than fall 1989.

The Katz Radio Group study looked at the 146 markets that received standard market reports for both the fall 1990 and fall 1989 periods. The study found that raw in-tab sample sizes declined in 60 markets, 41% of the total. It also found that an additional 36 markets, or 25%, showed higher sample sizes than in 1989, but the increase was less than 5%.

Katz Radio Group's Gerry Boehme, senior vice president, director of research, believes the facts revealed in the studies point to some issues that need to be addressed. Sample target was raised by 5% as promised, but the pre-designated sample for the average market actually decreased by 2%. More sample was not ordered to increase the actual in-tab diary counts. Boehme's report points out that Arbitron never promised in-tab increases, just a gain in sample target.

Although the report said that Arbitron has no real control on in-tab, the study said Arbitron does control the sample target, the designated sample and its projected response rate. Response rate did not decline, said Boehme, but the designated sample was not raised. The report poses the question: from where were the additional diaries going to come? –LC

MOVIE ADVERTISING: ENOUGH TO GO AROUND?

Film studios, which drove network prime time upfront in 1990, may not be as obliging this year; concern over network stampede and syndication and cable growth may mean shifting budgets; another question is effect of Hollywood's belt-tightening

Motion picture studio executives are looking forward to this year's upfront market. The studios, usually among the first group of advertisers to do business in the upfront because of their desire to lock up time for new releases, do not seem to have been entirely thrilled with how the upfront went last year, when they drove the market in a prime time spending frenzy upwards of $200 million, a 40% increase over 1989, according to industry estimates. This year, after watching the networks endure dismal scatter markets and scrap their complex audience guarantee plans for traditional guarantees, some studio executives are hoping to avoid the usual network upfront stampede and do deals on a more level playing field.

"I am looking forward to this year's negotiations," said one major studio media planner, adding that last year "the networks played us like a fiddle." This time around, the studio executive added, they "won't be able to dictate the flow to the degree that they have in the last two years." Added another studio executive: "There is going to be a lot of caution this year. The studios need to lock in time, but to be cost-effective we have to look different and be more selective."

One reason that the networks may find the studios playing more hardball this year is because of the growth of syndication and cable. Although studio executives and media buyers for the studios contacted by BROADCASTING pointed out that they tend to market product on a picture-by-picture basis, tracking studio spending habits over the last two years (see chart) shows they are definitely paying more attention to other alternatives. Of course, many films are targetted for the 12-34 demographic, and in some cases cable and syndication are the best route to reach that viewer. While all the studios increased their television spending last year and the three networks still get the bulk of the budget, some appear to have increased spending in syndication to the detriment of network.

For example, according to Arbitron's Broadcast Advertiser Reports, last year Sony-owned Columbia Pictures spent $44.5 million on ABC, CBS and NBC, an 8% cut from 1989. Meanwhile, the studio increased its spending on syndication by almost 200% to $10.3 million and its cable spending by 31% to about $5.1 million.

MCA's Universal Studios (now owned by Matsushita Electric Industrial Co.) slashed its network budget by 10% to roughly $38.3 million and increased syndication by 69% to about $8.6 million. "Syndication," explained one studio executive, "has become a very cost effective way of achieving all goals and has solid media delivery."

To a lesser extent, the cable networks have also seen growth, although some are still concerned about the validity of cable ratings. Studios increasing their cable spending include Columbia Pictures (up 31% to about $5.1 million). Paramount Pictures, which owns 50% of the USA Network along with MCA, increased its spending on cable by 30% to about $3.7 million. The biggest cable increase came from Twentieth Century Fox, which upped its budget almost 100% to $2.7 million.

Still, many still see cable, as Neil Lemlein, executive vice president, director, D'Arcy Masius Benton & Bowles entertainment group said, as an "atmospheric buy" that compliments the overall media plan.

And others are still not pleased with the accuracy of cable network ratings and the methods by which the cable net-

Continues on page 65.

LEADING MOVIE STUDIO ADVERTISERS ON TELEVISION: 1990 VS. 1989

	Network	% chg	Syndication*	% chg	Local/Retail	% chg	Cable	% chg	Total	% chg
Walt Disney Co.	$28,539,200	33	$8,869,000	73	$57,095,700	36	$2,218,001	-1	$96,721,901	37
Columbia Pictures	$44,518,400	-8	$10,274,800	195	$31,914,500	5	$5,153,995	31	$91,861,695	6
Universal	$38,376,300	-10	$8,673,300	69	$22,475,700	5.8	$4,571,537	10.6	$74,096,837	1.3
Warner Bros.	$26,580,600	17.5	$6,126,900	58.8	$26,735,800	-7.5	$3,899,699	8	$72,322,399	10.8
Paramount Pictures	$22,265,800	10.7	$8,032,600	18.4	$23,015,400	39	$3,751,170	30	$57,064,970	23
20th Century Fox	$23,325,100	40.6	$6,429,000	85.7	$23,578,100	28	$2,720,809	96	$56,053,009	41

**Includes Fox Broadcasting. Sources: Television Bureau of Advertising, Cabletelevision Advertising Bureau from data from Arbitron's Broadcast Advertiser Reports.*

CHANGING HANDS

This week's tabulation of station and system sales ($250,000 and above)

WZNY(FM) Augusta, Ga. □ Sold by Sunny Communications Inc. to Benchmark Radio Acquisition Fund II Ltd. for $5 million cash at closing, of which $1 million is for noncompete covenant. **Seller** is headed by Paul H. Rothfuss, who is president of Arrow Communications, licensee of WRLX(AM)-WFFX(FM) Tuscaloosa, Ala.; KMJC-FM Clinton, Iowa; WZOQ(FM) Wapakoneta, Ohio; WFRG-FM Rome and WHDL(AM)-WPIG(FM) Olean, both New York. KZBB-FM Ft. Smith, Ark., has been sold ("Changing Hands," Jan. 28). **Buyer** is headed by Bruce R. Spector, R. Calvin Sutliff Jr., C. Philip Rainwater and Joseph L. Mathias IV, and recently purchased WUSQ-AM-FM Winchester, Va. ("Changing Hands," March 4). Benchmark Radio Acquisitions is also licensee of WDOV(AM)-WDSD(FM) Dover, Del., and operates cable systems in Virginia and California. WZNY has adult contemporary format on 105.7 mhz with 66 kw and antenna 1,168 feet.

PROPOSED STATION TRADES

By volume and number of sales

Last Week:

AM's □ **$255,000** □ **4**
FM's □ **$7,600,000** □ **2**
AM-FM's □ **$300,000** □ **1**
TV's □ **$3,250,000** □ **3**
Total □ **$11,405,000** □ **10**

Year to Date:

AM's □ **$11,942,640** □ **50**
FM's □ **$63,859,100** □ **68**
AM-FM's □ **$95,158,054** □ **53**
TV's □ **$91,124,000** □ **21**
Total □ **$262,083,794** □ **192**

For 1990 total see Jan. 7, 1991 BROADCASTING.

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WXXV-TV Gulfport, Miss. □ Sold by Amsouth Bank, N.A. to Prime Cities Broadcasters Corp. of Mississippi for $3.2 million cash at closing, of which $50,000 is for five-year noncompete covenant. **Seller** is headed by John W. McRoberts, and is subsidiary of guarantor AmSouth Bank, N.A. McRoberts is vice president of Star Cablevision Inc., operator of cable systems at Brunswick, Ga. **Buyer** is headed by John B. Tupper (40%), Richard F. Shively (40%), Harry B. Smart (10%), Lawrence C. McQuade (5%) and William L. Kepper (5%). Shively holds 63% interest in Shively Communications Inc., which holds controlling interest in North Platte Television Inc., licensee of KNOP-TV North Platte, Neb. WXXV-TV is Fox affiliate on ch. 25 with 2,240 kw visual, 224 kw aural and antenna 1,780 feet above average terrain.

KXXR(FM) Kansas City, Mo. □ Sold by Olympia Broadcasting Corp. to Capital Broadcasting Inc. for $2.6 million cash. **Seller** is headed by Archie Kovanen, and owns KYAK(AM)-KCOT(FM) Anchorage and KIAK-AM-FM Fairbanks, both Alaska; KTRW(AM)KZZU-FM Spokane, Wash., and KRZR(FM) Fresno, Calif., as well as Olympia Broadcasting Network. **Buyer** is headed by Bruce Houston and is affiliated with The Ardman Broadcasting Group, headed by Myer Feldman. Ardman Broadcasting owns WZOU(FM) Boston, WPHR(FM) Cleveland, WIRA(AM)-WOVV(FM) West Palm Beach-Ft. Pierce, Fla.; WEZI-AM-FM Memphis; WVSR-AM-FM Charleston, S.C.; WCIB(FM) Falmouth, Mass., and KCKN(AM)-KBCQ(FM) Roswell, N.M. KXXR has CHR format on 106.5 kw and antenna 981 feet above average terrain. *Broker: Media Venture Partners.*

KYEL-TV Yuma, Ariz. □ Sold by Beacon Broadcasters Ltd. to KB Media Inc. for $1.4 million cash at closing. **Seller** is headed by Robert L. Gilbertson and Duncan Fraser, and recently sold WCFT-TV Tuscaloosa, Ala. ("Changing Hands," Jan. 28). **Buyer** is headed by John A. Radeck (33.3%), William H. Sanders (33.3%) and Kenneth L. Bazzle (33.3%). Sanders is 5% shareholder of Downs Broadcasting Inc., licensee of WXFX-FM Prattville, Ala., and KDXR-FM Borger, Tex.; 80% stockholder of Martin Media Inc., general partner of Cal Valley Radio Ltd., licensee of KVFX(FM) Manteca, Calif.; 50% stockholder of Radeck Broadcasting Inc., general partner of Big Sky Broadcasting Ltd., li-

MOVIE ADVERTISING

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works sell time. "We have not found a way to use cable and be comfortable," said one studio marketing executive. One thing that bothers the executive about cable is that they, according to the studio executive, try to sell as much inventory as possible in the upfront leaving little room for the scatter market: "They sell out too quickly."

Whether studio spending in 1991 will continue to increase at 1990's overall pace remains to be seen. Hollywood, in a very loud manner, has indicated that at least for now big budget pictures and marketing bonanzas may take a back seat to the bottom line. Several big budget films released last year did not command the box office draw that the studios were hoping for, and most are said to be re-evaluating their strategy. How that will affect the broadcasting industry is unknown. Said one studio executive: "As production costs have escalated, so have marketing costs. We have been somewhat conservative watching overhead and to do it wisely you have to look at both production and marketing."

Despite disappointing earnings for some studios last year, the bottom line also says that films—whether big budget or small budget—need heavy promotion and advertising—and it could turn out that while the films may look different this year, of marketing isn't.

One area of heavy spending by studios is the local/retail category. Although many of these "local" buys are done through rep firms, they are generally classified as local buys. Also, many studios conduct buying through regional agencies or directly with exhibitors.

However, last year local/retail spending for the six studios tracked by BROADCASTING was up only 1.3%. Time Warner's Warner Brothers Studio cut its spending in that category by 7.5% to about $26.7 million. And although 20th Century Fox, Paramount and Walt Disney increased spending in that category by more than 30%, they did not increase the overall category by much.

One reason for the decline may have been the heavily discounted network scatter rates in the fourth quarter that saw many advertisers pull money from other budgets and put it into network. West Coast station reps contacted by BROADCASTING are optimistic that the second quarter will be a good one. Marty Ozer, president, Katz Independent Television, said that first-quarter spending by the studios was up over last year despite the loss of some money to the networks. Now, with the networks said to be re-evaluating their pricing and considering raising their rates, the reps are hopeful that the flow of business will pick up again. **–JF**

INFOMERCIALS

Continued from page 63.

Guthy-Renker, the association is now searching for an executive director, much of whose job will be devoted to enforcement of those guidelines.

Three years ago, he said, more than half the infomercials on the air would have violated the guidelines, which require identification of sponsors, and which prohibit misleading viewers about a product's effectiveness or about the commercial nature of the program.

NIMA, he said, faces difficulties in attempting to "wash our hands of old methods" of infomercial production and presentation yet being barred by antitrust law from forcing producers to join the association or, therefore, ultimately to abide by its guidelines.

The seven defendants named by Morales include Synchronal, Omexin Corp., Smoothline Inc., and two current and one former Synchornal executive. The three infomercials are *Looking Closer*, promoting Omexin, a nonprescription baldness remedy; *Straight Talk*, "designed to sell Anushka Body Contouring Program" creams, gels and pills to help remove cellulite, and *Men's Health Forum*, which promotes the Kurk Clinic Program impotence remedy. Wachtel said the Omexin and Kurk products have not been marketed in the past year. **–PDL**

STOCK INDEX (CONT.)

EQUIPMENT & MANUFACTURING

		Closing Wed Mar 20	Closing Wed Mar 13	Net Change	Percent Change	P/E Ratio	Market Capitalization (000,000)
N	(MMM) 3M	88 1/8	87 1/2	5/8	00.71	14	19,561
N	(ARV) Arvin Industries	23 1/8	23	1/8	00.54	21	434
O	(CCBL) C-Cor Electronics	8	6	1 1/2	23.07	8	34
O	(CTEX) C-Tec Corp.	16	15	1/4	04.91	-30	263
N	(CHY) Chyron	13 1/16	7/8	– 1 1/16	– 07.14	-2	9
A	(COH) Cohu	12 1/8	12 1/8		00.00	9	23
N	(EK) Eastman Kodak	42 5/8	41 7/8	3/4	01.79	43	13,829
N	(HRS) Harris Corp.	25 1/2	25 1/8	3/8	01.49	8	1,022
N	(IV) Mark IV Indus.	11 1/4	11 3/8	– 1/8	– 01.09	2	152
O	(MATT) Matthews Equip.	2 9/16	2	9/16	28.12	128	15
O	(MCDY) Microdyne	9 3/8	7 5/8	1 3/4	22.95	133	39
O	(MCOM) Midwest Comm.	3/4	15/16	– 3/16	– 20.00	2	2
N	(MOT) Motorola	58 3/8	58 1/4	1/8	00.21	14	7,677
A	(PPI) Pico Products	5/8	7/8	– 1/4	– 28.57		2
N	(SFA) Sci-Atlanta	17 3/4	16 1/4	1 1/2	09.23	10	398
N	(SNE) Sony Corp.	47 5/8	49	– 1 3/8	– 02.80	25	15,808
N	(TEK) Tektronix	23 5/8	23 1/2	1/8	00.53	-8	686
N	(VAR) Varian Assoc.	45 3/8	41 1/2	3 7/8	09.33	-216	868
O	(WGNR) Wegener	13/16	1 1/8	– 5/16	– 27.77	-5	5
N	(ZE) Zenith	8 1/2	8 1/4	1/4	03.03	-3	227

SERVICE

		Closing Wed Mar 20	Closing Wed Mar 13	Net Change	Percent Change	P/E Ratio	Market Capitalization (000,000)
O	(AFTI) Am. Film Tech.	6	6		00.00	20	58
O	(BSIM) Burrup & Sims	9 1/2	9 5/8	– 1/8	– 01.29	105	119
A	(CLR) Color Systems	3 5/8	3 1/2	1/8	03.57	-4	33
N	(CQ) Comsat	27 1/2	26	1 1/2	05.76	9	514
N	(CDA) Control Data	11 7/8	11 3/8	1/2	04.39	-2	505
N	(DNB) Dun & Bradstreet	47 3/8	45 1/8	2 1/4	04.98	17	8,644
N	(FCB) Foote Cone & B.	25 3/8	25 1/8	1/4	00.99	13	274
O	(GREY) Grey Adv.	134	142	– 8	– 05.63	12	151
O	(IDBX) IDB Commun.	9	7 3/4	1 1/4	16.12	100	57
N	(IPG) Interpublic Group	44	43 1/2	1/2	01.14	19	1,504
N	(OMC) Omnicom	29 1/4	26 3/4	2 1/2	09.34	14	767
O	(RTRSY) Reuters	46	47 1/2	– 1 1/2	– 03.15	21	19,829
N	(SAA) Saatchi & Saatchi	1 1/8	1 1/8		00.00	-1	178
O	(TLMT) Telemation	1 1/4	1 1/4		00.00		1
O	(TMCI) TM Commun.	1 1/4	1 1/4		00.00	-1	5
A	(UNV) United Video	8 5/8	8 3/8	1/4	02.98	-14	13
O	(WPPGY) WPP Group	5 1/8	5 1/8		00.00	1	210

Standard & Poor's 400	444.63	436.62	– 8.01	– 1.8%

■ **Boyce, LA** KBCE(FM) 102.3 mhz—March 11 application for CP to change ERP: 25 kw H&V; ant.: 88. m.; class: C3 (per docket #89-463).

■ **Mesquite, NV** KIPP(FM) 97.5 mhz—Jan. 24 application for mod. of CP (BPH880615MD) to change ant.: 299 m.; change TL: 20 km W of Mesquite, NV, and 9 km N of U.S. Hwy. 15.

■ **Holdenville, OK** KHUD(FM) 106.5 mhz—March 11 application for mod. of CP (BPH880707MC) to change ERP: 4.5 kw H&V; change ant.: 62 m.

■ **Barnwell, SC** WBAW-FM 101.7 mhz—March 11 application for CP to change ERP: 25 kw H&V; change Channel to 256C3 (per docket #89-489).

■ **Gatlinburg, TN** WDLY(FM) 105.5 mhz—March 11 application for CP to change ERP: .654 kw H&V; ant.: 294 m.

■ **Jasper, TX** KJAS(FM) 100.9 mhz—March 6 application for CP to change ERP: 50.0 kw H&V; change ant.: 150 m.; change TL: 4 mi N of Curtiss, TX.

■ **Chase City, VA** (no call letters) 99.9 mhz—March 4 application for mod. of CP (BPH880107NH) to change ERP: 25 kw H&V; change channel to 260C3 (per docket #89-601).

Actions

AM's

■ **Brawley, CA** KKOP(AM) 1300 khz—March 12 application (BP900803AF) granted for CP to change TL: .43 mi E of Hwy. 111, 2.6 mi SE of Brawley, CA and make changes in antenna system.

■ **Douglas, GA** WDMG(AM) 860 khz—March 18 application (BP900625AC) granted for CP to change TL: to Georgia 32, 2.9 km E of Douglas, GA 31 30 23N 82 49 10W.

■ **Scottsville, KY** WLCK(AM) 1250 khz—March 12 application (BP900907AE) granted for CP to reduce power to 860 watts; correct coordinates to: 36 44 25N 86 10 31W; and make changes in antenna system.

■ **Laurel, MD** WILC(AM) 900 khz—March 12 application (BMP901228AA) granted for mod. of CP (BP880204AD) to make changes in antenna system and reduce day power to 1.9 kw.

FM's

■ **Pago Pago, AS** KSBS-FM 92.1 mhz—March 14 application (BPH900816II) granted for CP to change ERP: 15 kw H&V; change ant.: -28 m.; change to class C3.

■ **Payson, AZ** KRMM(FM) 101.1 mhz—Feb. 27 application (BMPH890811IF) granted for mod. of CP (BPH860212MF) to change ERP: 88.3 kw H, 80.87 kw V; TL: 5 mi Electronics Site, Hwy. 87, 2.7 km NW of Strawberry, AZ; class: C1 (per docket #88-118).

■ **Wynne, AR** KWYN-FM 92.7 mhz—March 18 application (BPH901203IB) returned for CP to change freq: 92.5 mhz; change ERP: 25 kw H&V; ant.: 100 m.; TL: app. 4.1 mi SW of City of Wynne, AR on Rural Rd. 131 degrees; change to class C3 (per docket #89-529).

■ **Ellijay, GA** WLJA-FM 93.5 mhz—March 14 application (BPH900410ID) granted for CP to change ERP: 6 kw H&V; change ant.: 83 m.

■ **Chicago** WXAV(FM) 88.3 mhz—March 11 application (BMPED910129ID) granted for mod. of CP (BPED880324MA) to change ERP: .150 kw H&V; ant.: 39 m.; TL: 10044 S Central Park, Chicago, IL.

■ **Decatur, IL** (no call letters) 93.1 mhz—March 12 application (BMPH901106IB) granted for mod. of CP (BPH880407MU) to change ERP: 6 kw H&V (max-directional antenna).

■ **Belle Chasse, LA** KNOK(FM) 102.9 mhz—March 7 application (BMPH901231IC) granted for mod. of CP (BPH900531IE) to change ERP: 5.2 kw H&V; ant.: 184 m.; class: C3; TL: 3900 Mariette St., Chalmette, St. Bernard Parish, LA (per docket #89-569).

■ **Ludington, MI** WKLA-FM 106.3 mhz—Feb. 27 application (BPH900920IF) granted for CP to change ERP: 4.05 kw H&V; change ant.: 122 m.; TL: the tower site is located 600 ft. N on Ehler Rd. and 1000 ft. E of Jebavy Rd. and 9.8 km bearing 192 degree to Ludington.

■ **Rochester, MN** KRCH(FM) 101.7 mhz—March 12 application (BPH900710IB) granted for CP to change ERP: 39.1 kw H&V; change ant.: 169 m.; TL: 2.65 km NE of Village of Danesville, Milton Township State of Minnesota; change to class C2 (per docket #89-321).

■ **Belgrade, MT** KGVW-FM 96.7 mhz—March 12 application (BPH901025IB) dismissed for CP to change ant.: 212.4 m.; TL: High Flat, 11 mi W-SW of Bozeman, MT.

■ **Winnebago, NE** KSUX(FM) 105.7 mhz—March 11 application (BPH900911IE) granted for CP to change ERP: 50 kw H&V; change ant.: 141 m.; change to class C2 (per docket #88-502).

■ **Fayetteville, NC** WFSS(FM) 88.1 mhz—March 11 application (BPED860811MF) granted for CP to change freq: 91.9 mhz; change ERP: 100 kw (max).

■ **Knoxville, TN** WIVK-FM 107.7 mhz—March 12 application (BPH900730IB) granted for CP to change ERP: 96 kw H&V; change ant.: 626 m.; TL: on Greentop Mountain, 4.7 km at 304.9 degrees (T) from Walden Creek, TN.

■ **Clifton, TX** KWOW(FM) 103.3 mhz—March 19 application (BPH910108IA) returned for CP to change ERP: 8.369 kw H&V; change ant.: 175 m.; TL: State Rte. 708, 6.5 mi E of Clifton, TX; change class: C3 (per docket #89-568).

■ **Livingston, TX** KETX-FM 92.1 mhz—March 6 application (BPH880613IA) granted for CP to change ERP: 50 kw H&V; change freq: 92.3 mhz; and change class A to class C2.

■ **Pacos, TX** KPTX(FM) 98.3 mhz—March 11 application (BPH901119IH) returned for CP to change ERP: 6 kw H&V; change ant.: 99.9 m.; TL: 1.7 mi N of U.S. Hwy. 80, 10 mi NE of Pecos, TX.

■ **Staunton, VA** WSGM(FM) 93.5 mhz—March 4 application (BPH900830IF) granted for CP to correct coordinates: 38 10 32N 79 04 12W.

■ **Ravenswood, WV** WRZZ(FM) 102.3 mhz—March 12 application (BMLH900510KB) returned for mod. of license to increase ERP: 1.84 kw H&V (pursuant to docket #88-375).

■ **Shawano, WI** WOWN-FM 99.3 mhz—March 19 application (BPH910104IA) returned for CP to change ERP: 13.9 kw H&V; ant.: 134 m.; TL: SE corner of the SE Quarter of section 5, town of Angelica, WI; class: C3; other: change of antenna system from Omni-Directional to Directional (per docket #89-511).

SUMMARY OF BROADCASTING & CABLE

BROADCASTING

SERVICE	ON AIR	CP's [1]	TOTAL [2]
Commercial AM	4,986	246	5,232
Commercial FM	4,402	944	5,346
Educational FM	1,442	305	1,747
Total Radio	10,830	1,495	12,325
Commercial VHF TV	553	18	571
Commercial UHF TV	564	178	742
Educational VHF TV	124	3	127
Educational UHF TV	229	16	245
■ Total TV	1,470	215	1,685
VHF LPTV	192	173	365
UHF LPTV	629	1,015	1,645
■ Total LPTV	821	1,188	2,009
FM translators	1,874	337	2,211
VHF translators	2,709	94	2,803
UHF translators	2,256	371	2,627

CABLE

Total subscribers	53,900,000
Homes passed	71,300,000
Total systems	10,823
Household penetration[3]	58.6%
Pay cable penetration	29.2%

* Includes off-air licenses. † Penetration percentages are of TV household universe of 92.1 million. [1] Construction permit. [2] Instructional TV fixed service. [3] Studio-transmitter link. Source: Nielsen and Broadcasting's own research.